

A large, stylized logo in the background featuring a yellow sun with rays, a green leaf, and a blue wave-like shape.

BCC Strategic Plan

BCC Workshop
December 21, 2021



CHARLOTTE COUNTY
FLORIDA

VISION

MISSION

VALUES

STRATEGIC FOCUS AREAS

Public Services

Economic & Community
Development

Infrastructure

Efficient & Effective
Government

Bold Goals

Strategic Initiatives

Results / Measures

Economic & Community Development

To create a business climate that promotes a diversified, growing economy consistent with sustainable growth management plans, environmental stewardship and enhanced quality of life.

Economic & Community Development

Bold Goals

- Averaging 200 new affordable housing units added to the community inventory per year, 1000 total units added in 5 years
- Develop and implement the One Charlotte One Water integrated water resource management plan before the end of FY2023
- Increase dual enrollment in vocation centers and local colleges by 3%
- Increase # of college internships to 15 students (5 students per semester) for FY2022. 20 students for FY2023.

Affordable Housing

Averaging 200 new affordable housing units added to the community inventory per year, 1000 total units added in 5 years.

Affordable Housing Accomplishments

- Creation of taskforce and strategic “Tool Kit”
- Creation of Charlotte HOME
 - Aligned local and state developer incentive process
 - Waived impact fees for 182 affordable housing units
- Investment in Affordable Housing Trust Fund
- Process for Local Government Area of Opportunity (LGAO) and property transfer to qualified non-profits

Affordable Housing Initiatives in Progress

- Expansion and strengthened Affordable Housing Advisory Committee (AHAC)
- Ongoing advocacy and planning for State Housing Initiatives Partnership (SHIP) funding (Sadowski)
- Revision of the affordable housing section of the Comprehensive Plan
- Ongoing education and planning around County density units
- Planning for County becoming an entitlement community
- Support Community Land Trust and work to become Community Housing Development Organization (CHDO)

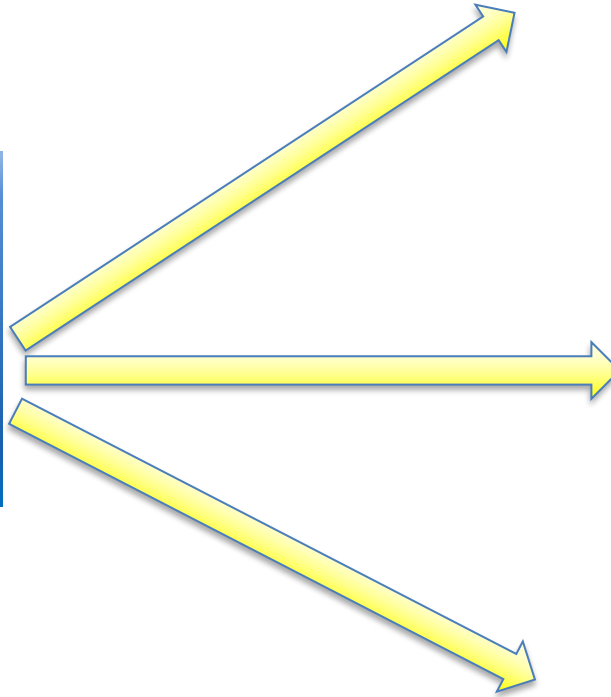
Affordable Housing Potential Initiatives

- Explore increased partnership with the Punta Gorda Housing Authority
- Strengthen partnership with Lee County Housing Finance Authority and explore additional strategies to increase the use of Multi-family Mortgage Revenue Bonds (MMRB)
- Prioritize planning & zoning strategies that increase affordable housing, particularly accessory dwelling units and missing middle
- Expansion of investment in the Affordable Housing Trust Fund
- Research possibility of creating a HUD HOME consortium to receive federal funding towards affordable housing
- Continue to work with community partners for creative solutions to affordable housing
- Create public/private partnerships
- Align all processes for developers and builders to create efficiencies

Water Quality

Develop and implement the One Charlotte One Water integrated water resource management plan before the end of FY2023.

BOLD GOAL:
Implement One Charlotte,
One Water management
plan before end of FY2023

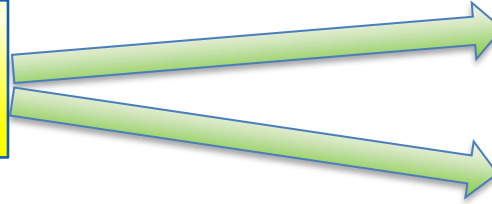


Implementation of County Water Quality
Monitoring Strategy

Publish GIS Map and Reporting Tool

Develop Draft One Charlotte, One Water
Plan

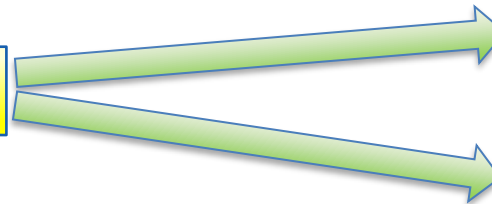
Implementation of County Water Quality
Monitoring Strategy



**Countywide water quality
monitoring program**

**Review/refine water quality
monitoring program**

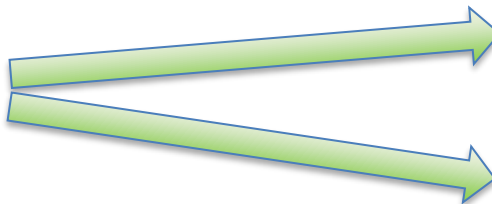
Publish GIS Map and Reporting Tool



**Inventory & spatially map
current efforts**

**Develop online data reporting
tools**

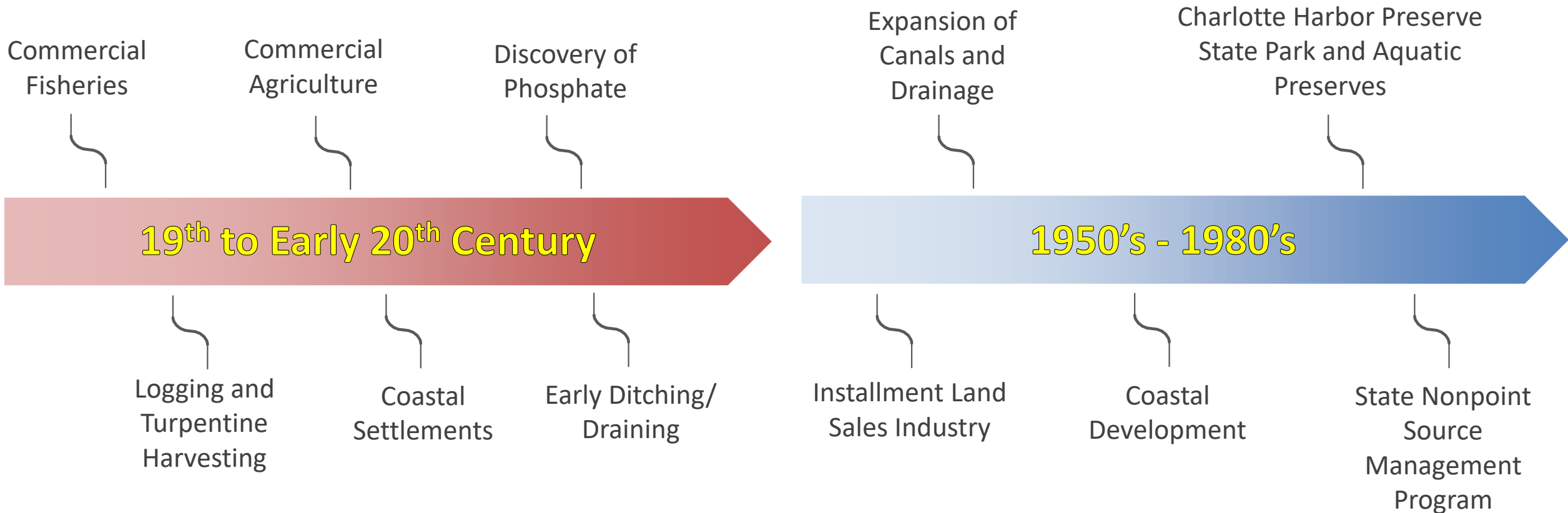
Develop Draft One Charlotte, One Water
Plan



**Create partnerships and plan
impactful projects**

**Identify priority projects &
funding**

Water Quality: Past, Present, and Future



Water Quality: Past, Present, and Future

Surface Water
Improvement
and
Management
(SWFWMD)

Florida
Watersheds
Restoration Act

Septic to
Sewer and
Blue Water
Strategy

County
Fertilizer
Ordinance

1990's-Present

Charlotte Co.
Utilities

Coastal and
Heartland National
Estuary Partnership

Facilitating Agricultural
Resource
Management Systems
(SWFWMD)

One
Charlotte,
One Water
Plan

Advanced
Waste
Treatment

Ongoing and Future Efforts

County WQ
Monitoring

Septic to
Sewer
(Ongoing)

Basin Management
Action Plans and/or
Alternative
Restoration Plans



Workforce Development

Increase dual enrollment in vocation centers and local colleges by 3%

Increase # of college internships to 15 students (5 students per semester) for FY2022. 20 students for FY2023.

Accomplishments

- **Partnerships with local Colleges**
 - Completed “career pathways” – links workforce needs to programs offered
 - Student assembly & job fair participation
 - Support with resume writing, mock interviews

Accomplishments

- **Highschool Partnerships**

- Career counselors posting County jobs & speaking engagements re: dual enrollment
- Tracking HS students as a NeoGov source
- Quarterly college visits discussing job postings, intern/temporary opportunities, promotional materials

Accomplishments

- **Projects & Programs**

- Airframe & Powerplant Program
- Career exploration & mentoring, various partnerships, i.e. Career Sources, Big Brothers Big Sisters mentoring, advisory committees, job shadowing

Bold Goal

- Increase dual enrollment in vocational center and local colleges by 3%
 - CTC increased dual enrollment: 22 Seniors, 34 Juniors & Sophmores
 - Speaking engagements with students through Career Counselors at local high schools

Bold Goal

- Increase college internships to 15 students for FY2022, 20 students for FY2023
 - The chart below shows the data over several years

Internship Data

School	2017/18	2018/19	2019/20	2020/21	2021/22	TOTAL
Charlotte County Seniors	3	1				4
Charlotte Technical College	2	1	3	3	3	12
FSW	4	3	3			10
FGCU	2	4	5	4	4	19
USF Sarasota-Manatee		4	2	1		7
USF Tampa	3			2		5
State College of FL		2				2
Keiser University						
Southern Technical						
Hodges University		1				1
Suncoast Technical						
New College of FL (Sarasota)	1					1
Univeristy of Florida						
Florida International University	1			2		3
Other		1			1	2
TOTAL	16	17	13	12	8	66

Future Plans – next 2 yrs

- Continue all of the previous initiatives
- Expand our volunteer usage through a partnership with the Interagency Group Volunteer Program
- Creating a “Day in Government” for HS Seniors
- Technological advances, reduce days to fill, candidate experience

Infrastructure

To build and maintain countywide infrastructure that meets our evolving needs and enhances our community appearance, improves public safety and protects our natural resources.

Infrastructure

Revised Goals

- Funding and completion of Capital Needs Assessment through 2026.
- Define and maintain balance between Capital and Operating budgets.

Capital Needs

Funding and completion of Capital Needs Assessment through 2026.

Capital Needs Assessment

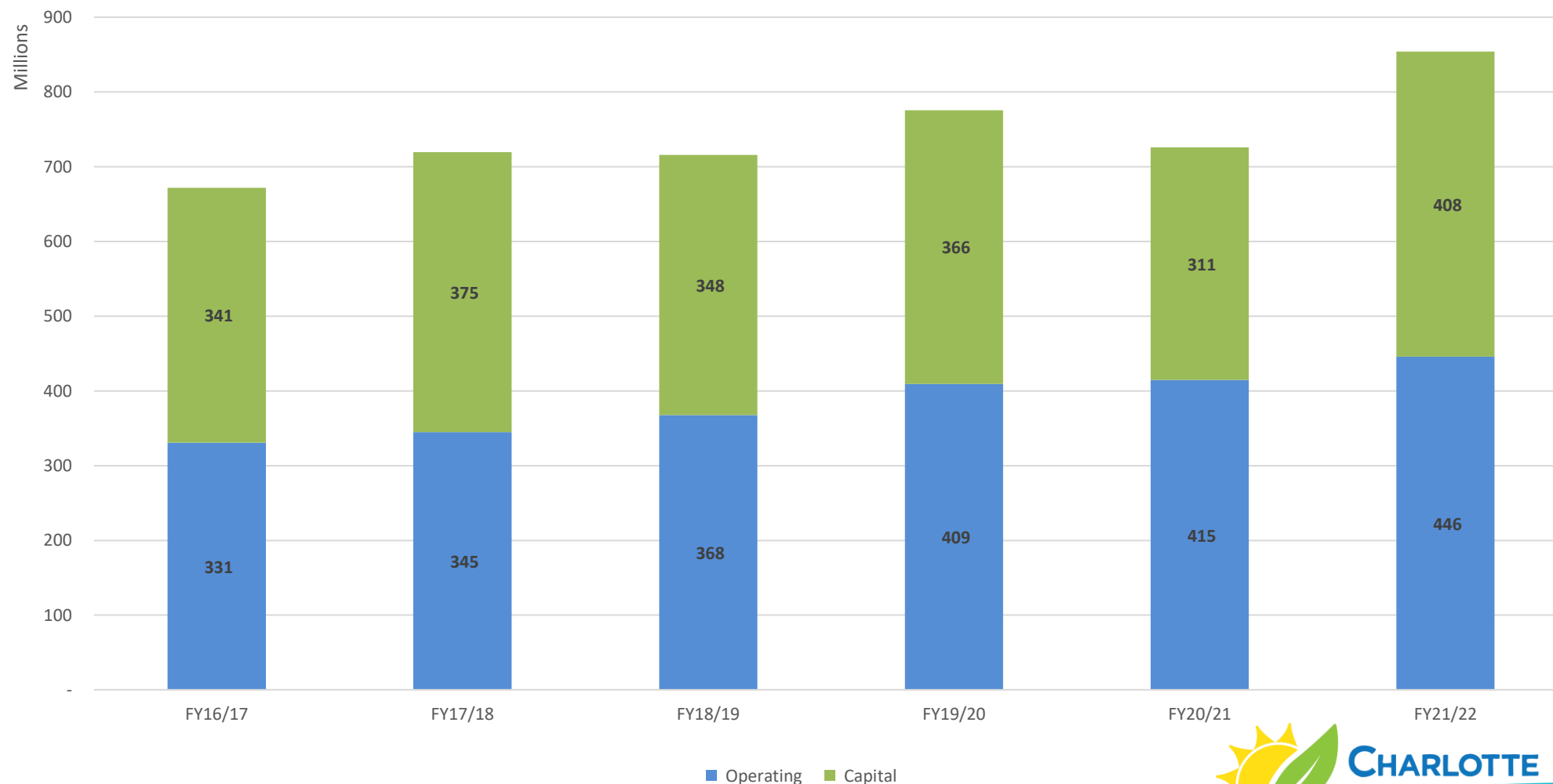
- Goal - Funding and completion of Capital Needs Assessment through 2026
 - Funding allocated to complete the CIP
 - Updated the CIP Policy last year allowing for greater participation in CNA/CIP budget process
 - To allow for greater review of projects for selection into the CIP the CNA will be updated during budget cycle off year

Capital vs Operating

Define and maintain balance between Capital and Operating budgets.

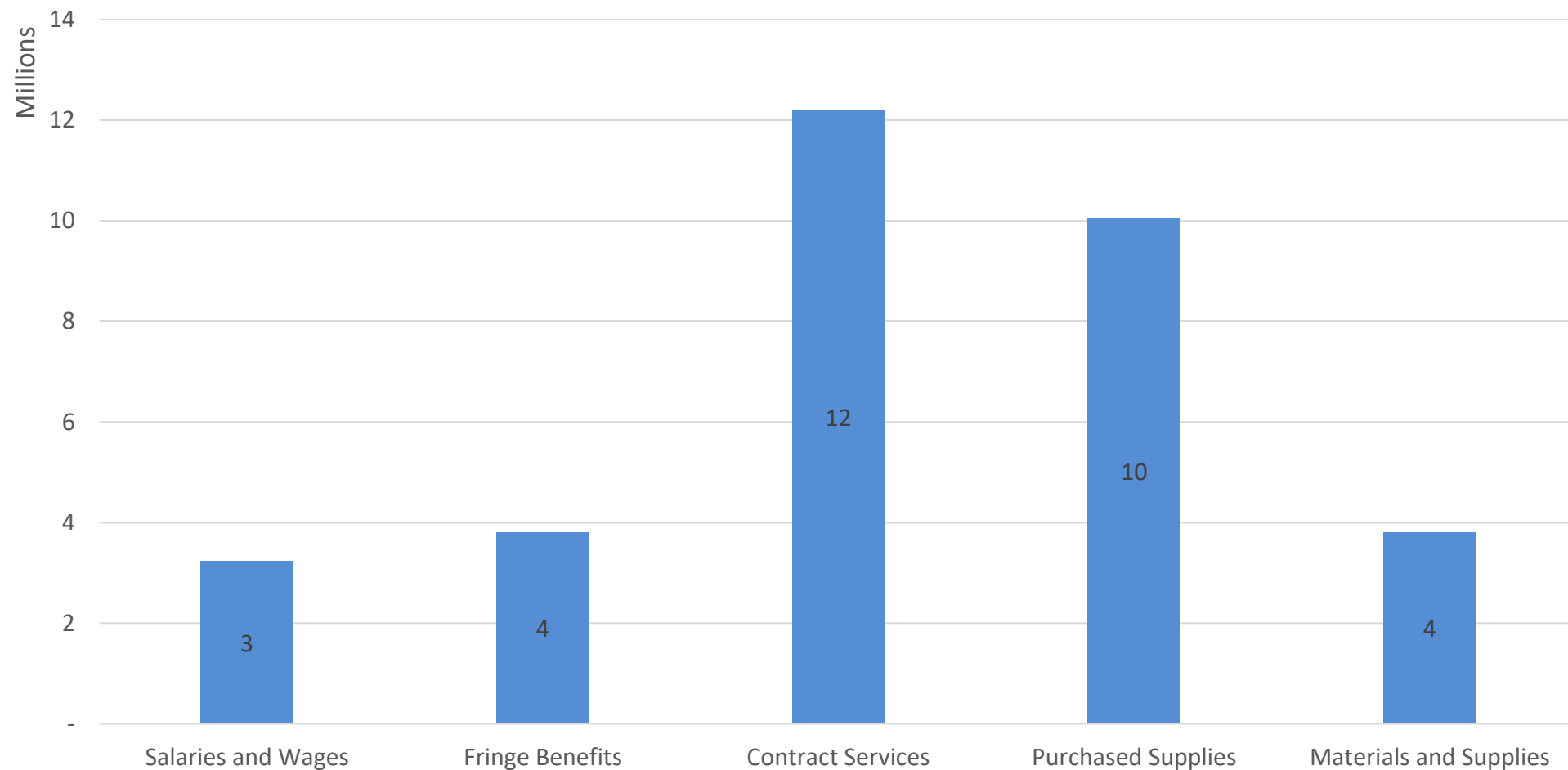
Net Budget

Capital vs Operating



CHARLOTTE COUNTY
FLORIDA

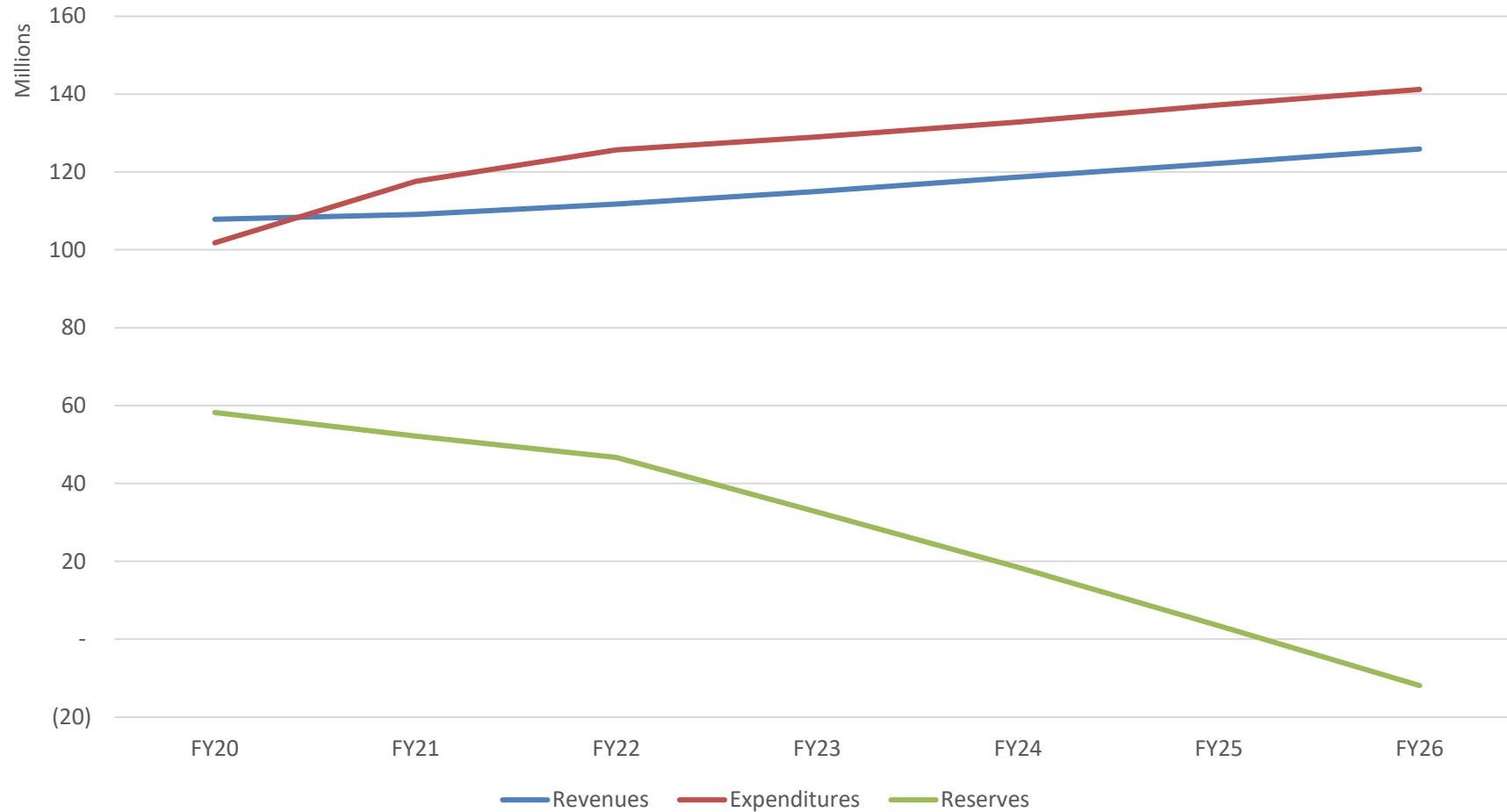
FY22 Net Budget Operating Increases



General Fund

Revenues vs Expenditures

As presented May 18, 2021

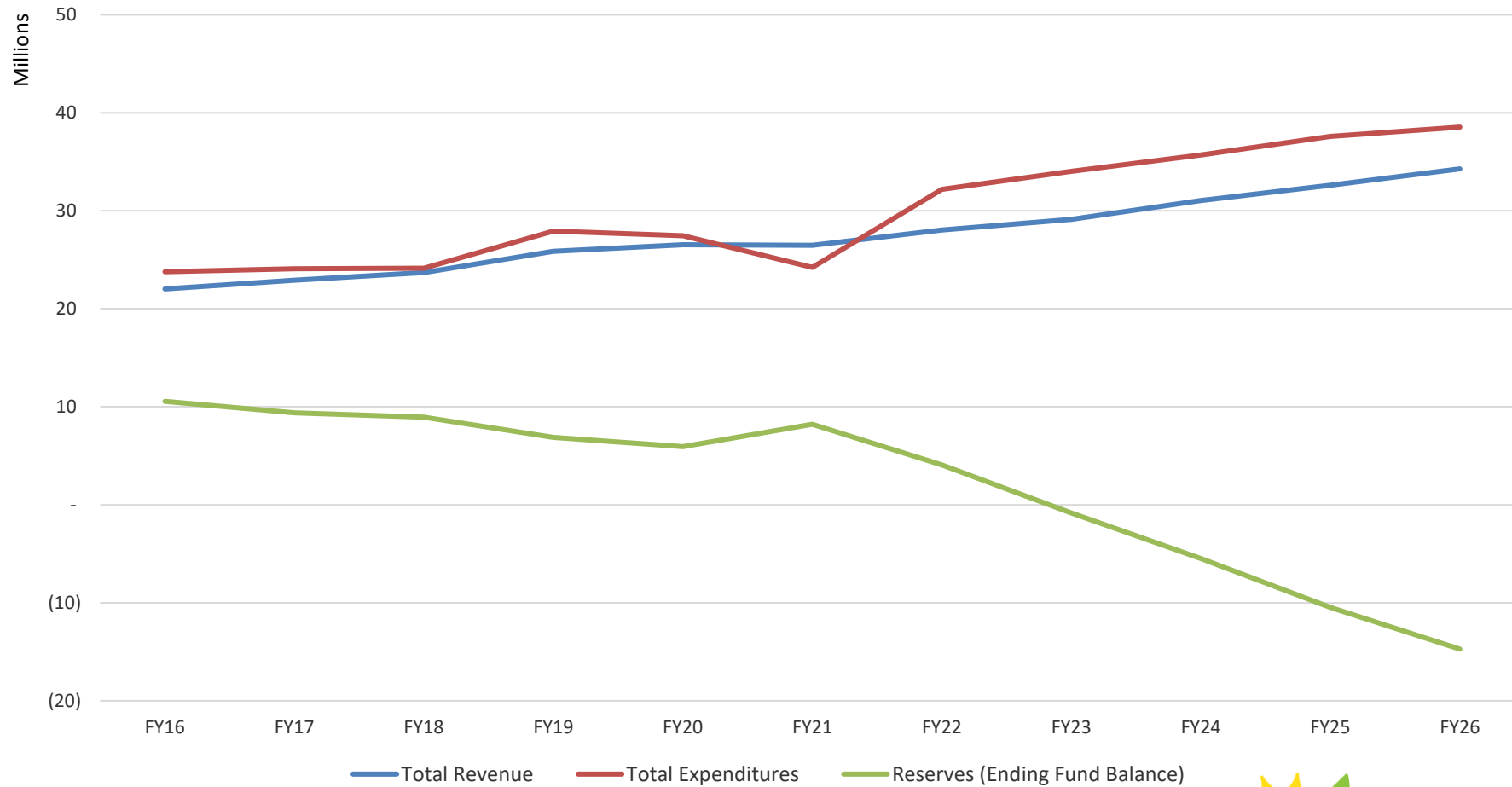


FY20	Actuals
FY21	Adopted Budget
FY22 – FY23	Planned Budget
FY24 – FY26	Projected

Charlotte County Fire MSBU

Fully Loaded with 4% Rate Increase Annually

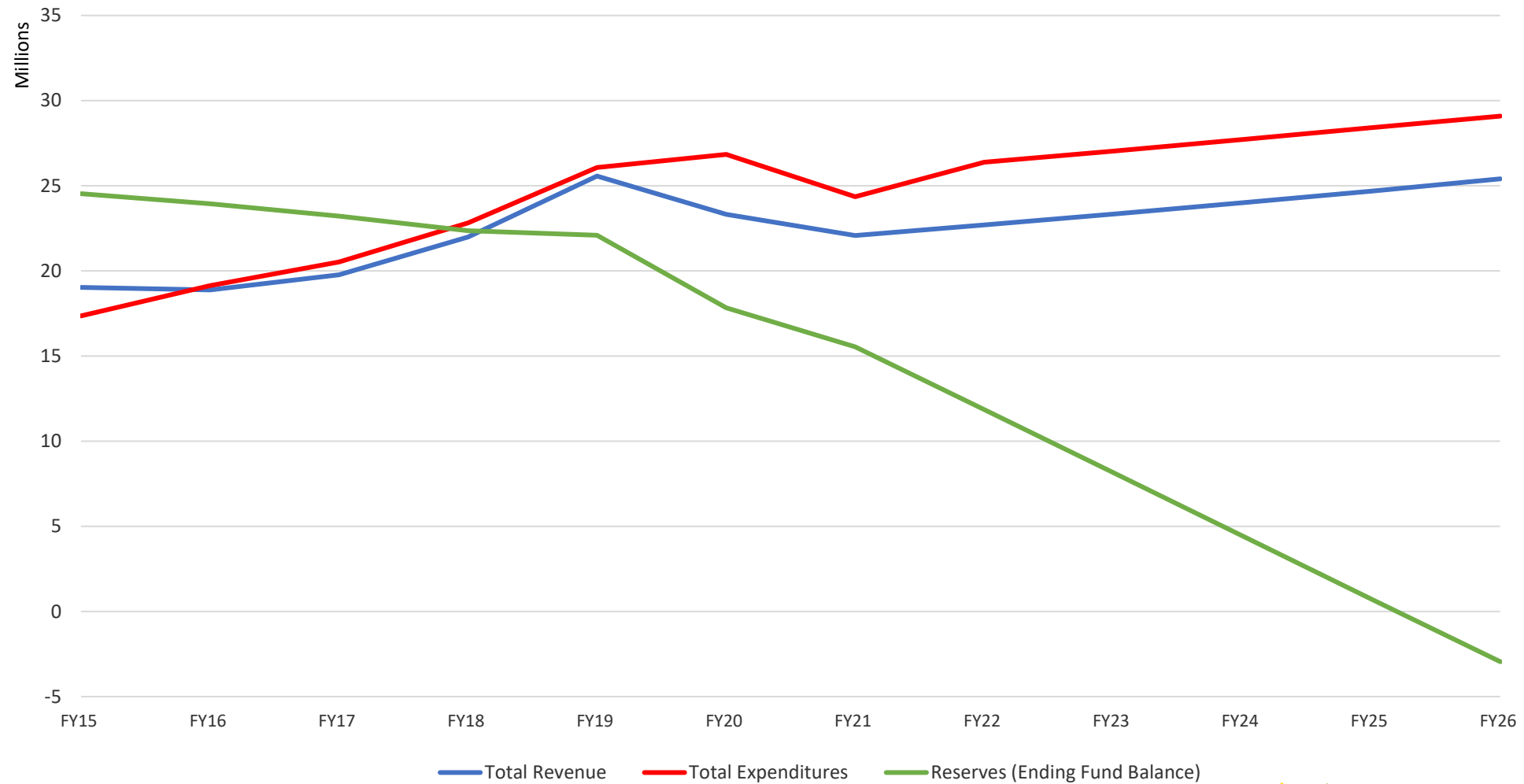
As presented May 18, 2021



FY16 – FY20	Actuals
FY21 – FY26	Projected

Transportation Trust Fund

As presented May 18, 2021



FY16 – FY20	Actuals
FY21 – FY26	Projected

Actions Taken

- Stadium costs allocated to the Growth Incremental Fund
- Federal funding allocated to Public Safety payroll
- Fire MSBU rates increased to max rates
- Road and Bridge paving costs allocated to Capital Projects

Future Steps

Fiscal staff to create long range projections and identify key issues

- 10 Year Actual and 10 Year Projection
 - General Fund
 - Transportation Trust
 - Stadium Fund
 - Public Safety
 - Landfill
 - Tourism

Bring analysis back to the BCC

Public Services

To maintain a safe and healthy community by delivering essential services from skilled, professional and dedicated public servants.

Public Services

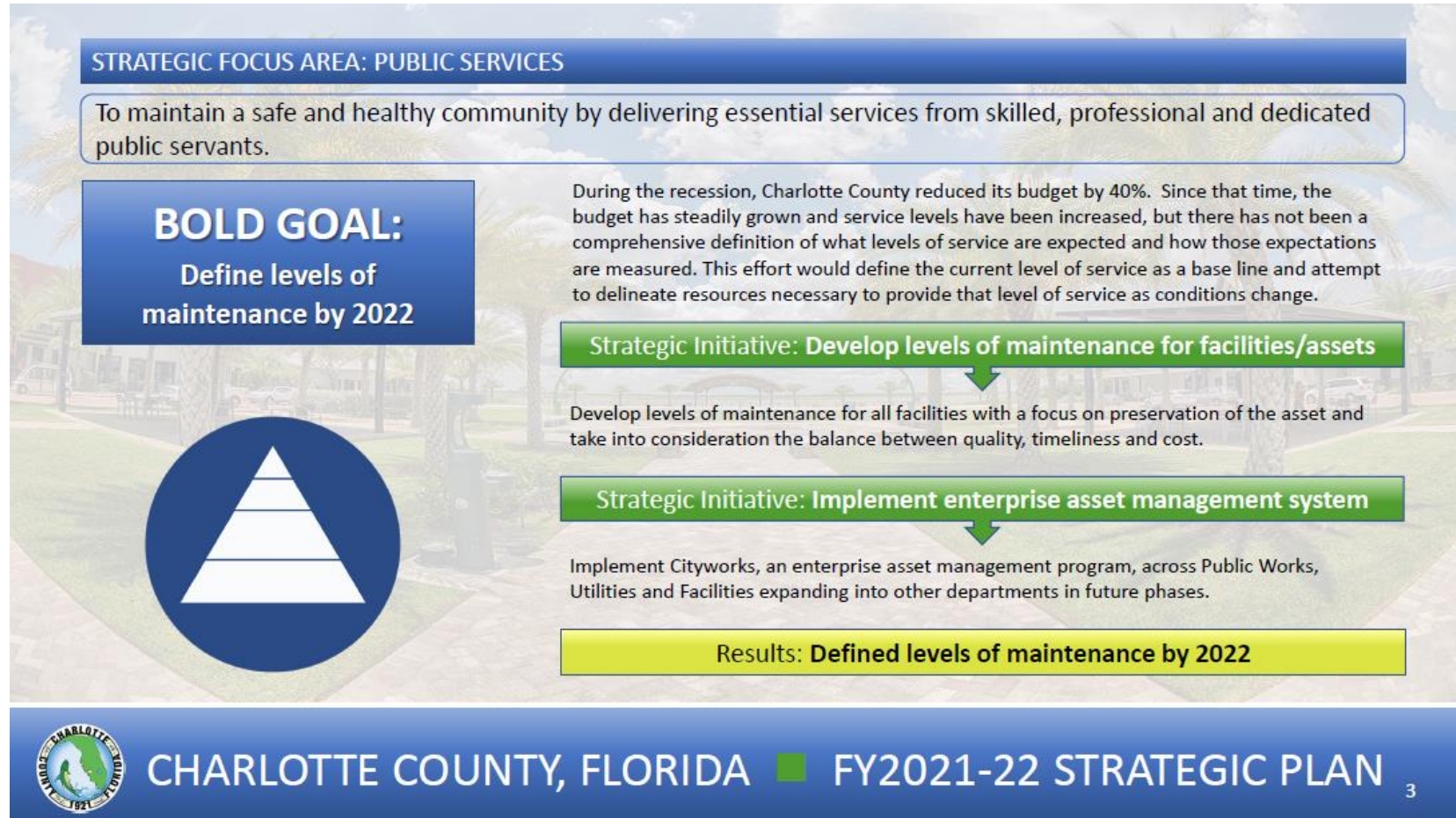
Revised Goal

- Define levels of maintenance by 2022

Levels of Maintenance

Define levels of maintenance by 2022 .

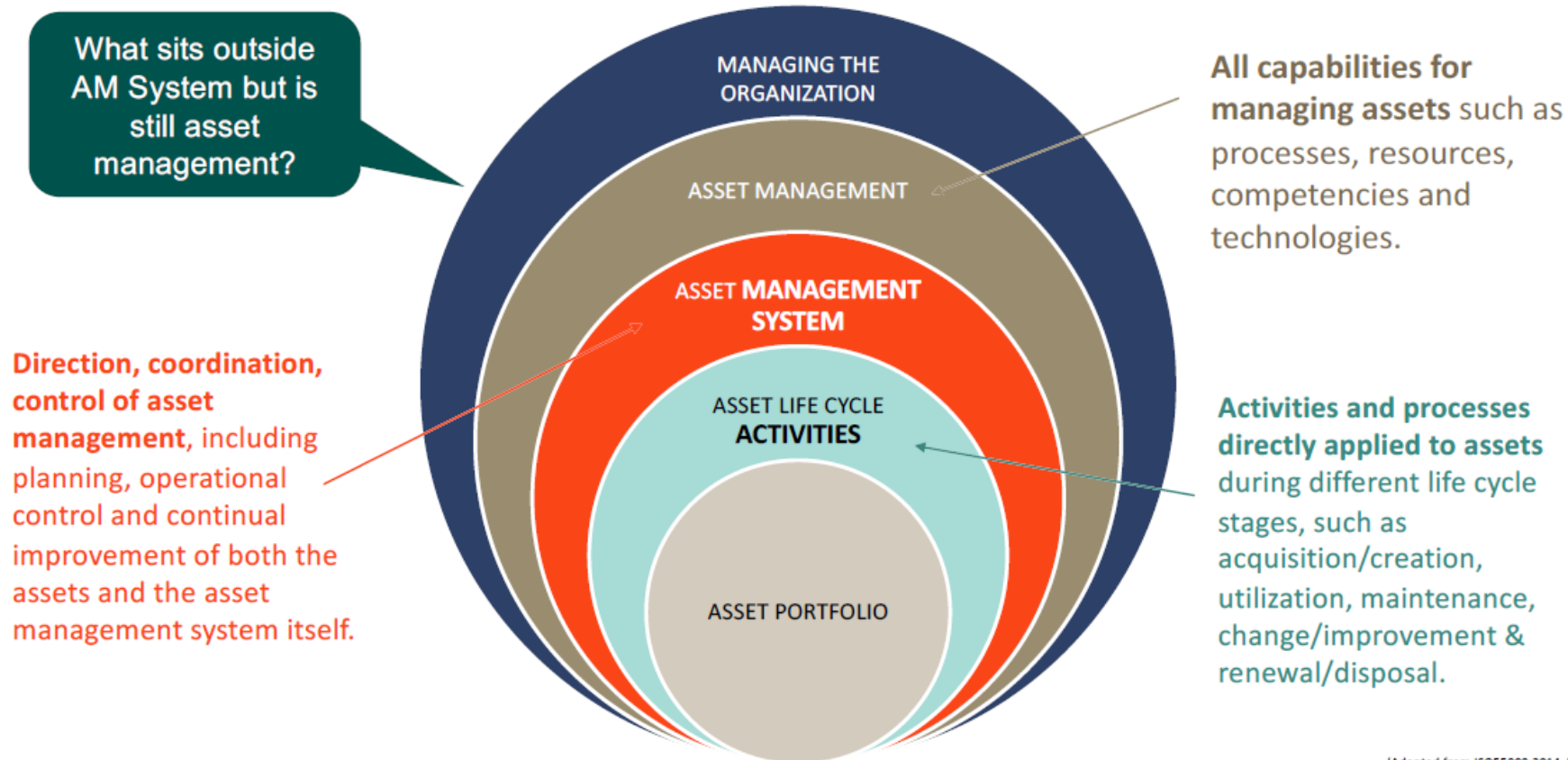
FY2021-22 Strategic Plan



Background

- 2016 – County initiated replacement to the Enterprise Asset Management System (EAMS)
- July 2016 – LA Consulting (LAC) contracted to develop solutions for a new system
- January 2018 – Facilities was included in the asset management system evaluation
- November 2019 – Cityworks was selected to replace EAMS
- March 2020 – Jones Edmunds contracted to implement Cityworks
- April 2021 – New position created for Asset Management in Administration to ensure enterprise approach and implement a County Asset Management Program

Asset Management System



Cityworks Asset Management Software Objectives

- Tasks
- Schedule
- Expected Benefits

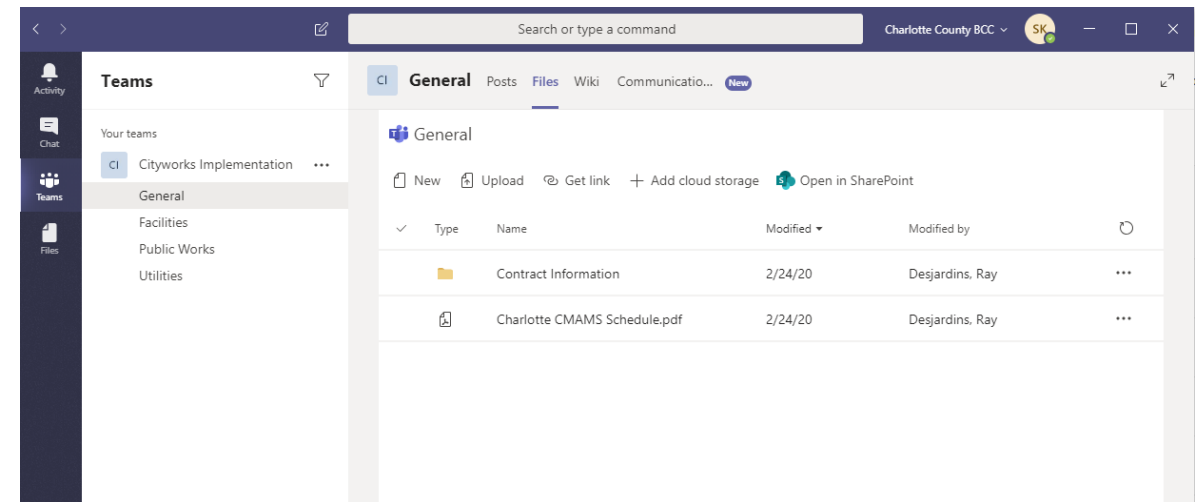
Implementation Tasks

- Project Planning and Management
- GIS Review & Data Creation
- System Design Plan
- Workshops
- Cityworks Configuration
- Integrations
- Testing and Training
- Ongoing Support

Project Planning and Management

Teams Project Site

- Kick-Off Meetings
- Monthly Meetings
- Steering Committee
- Implementation Committee
- Planning
- Change Management

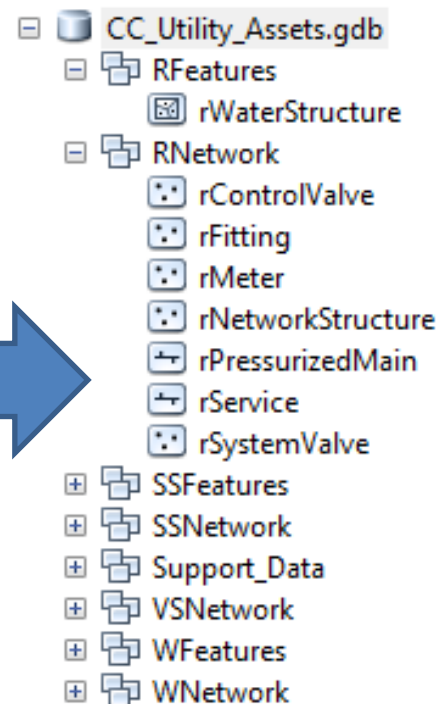
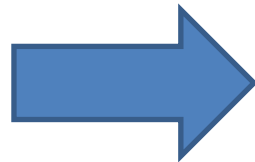


GIS Review & Data Creation

- Public Works
- Utilities
- Facilities

- Data updates from tabular info
- Propose GIS schema
- Update GIS database

BS CIS Meter Assets 20191107
BSRO Assets Latest
GIS Vacuum_Pits GIS Modification
RCLM Backflow Prelim Assets 20191107
RCLM Reclaim booster & asset maintenance 20191107
WD Compliance Sample Routes 20191107
WD Hydrant Asset List 20191107
WD Valve Asset List 20191107
WD WBS asset maintenance 20191107
WW & WTR Treatment Plant Assets 20191107
WWC LPS Assets 20191107
WWC VPOD assets 20191107



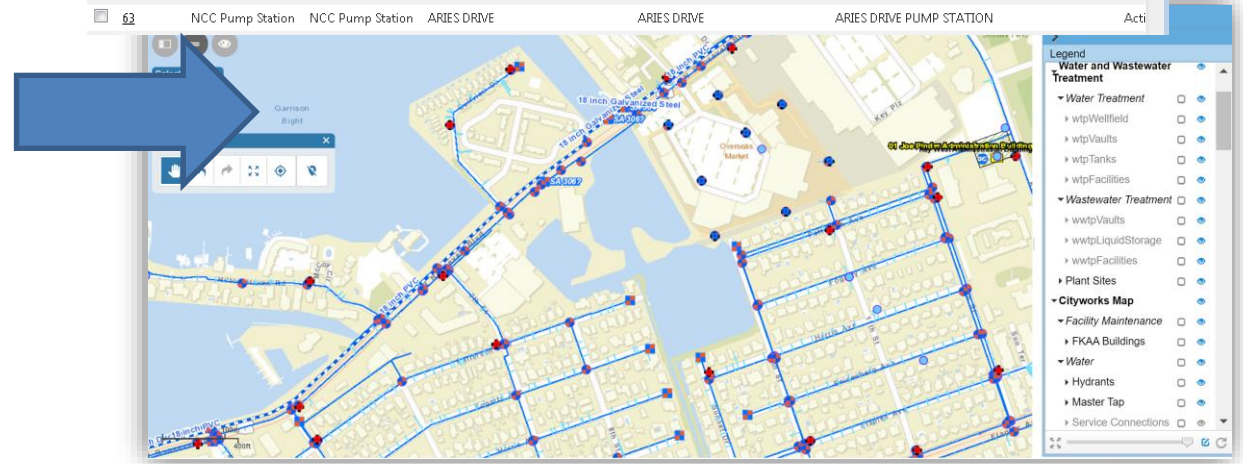
Cityworks

Inbox Buildings New SR New WO New Insp Search Reports PLANT OPS Storeroom

GIS Search Criteria Data

Drag a column header and drop it here to group by that column

OBJECTID	Subtype	DrawSymbol	AssetID	LegacyID	Location	Life
71	NCC Pump Station	NCC Pump Station	ADAMS RUN	ADAMS RUN	ADAMS RUN PUMP STATION	Acti
159	NCC Pump Station	NCC Pump Station	AINSLEY WOODS	AINSLEY WOODS	AINSLEY WOODS PUMP STATION	Acti
102	NCC Pump Station	NCC Pump Station	AIRPORT RD	AIRPORT RD	AIRPORT RD PUMP STATION	Acti
69	NCC Pump Station	NCC Pump Station	ALAPOCAS II	ALAPOCAS II	ALAPOCAS II PUMP STATION	Acti
11	NCC Pump Station	NCC Pump Station	ALAPOCAS PARK	ALAPOCAS PARK	ALAPOCAS PARK PUMP STATION	Acti
29	NCC Pump Station	NCC Pump Station	APPOQUIN	APPOQUIN	APPOQUIN PUMP STATION	Acti
63	NCC Pump Station	NCC Pump Station	ARIES DRIVE	ARIES DRIVE	ARIES DRIVE PUMP STATION	Acti



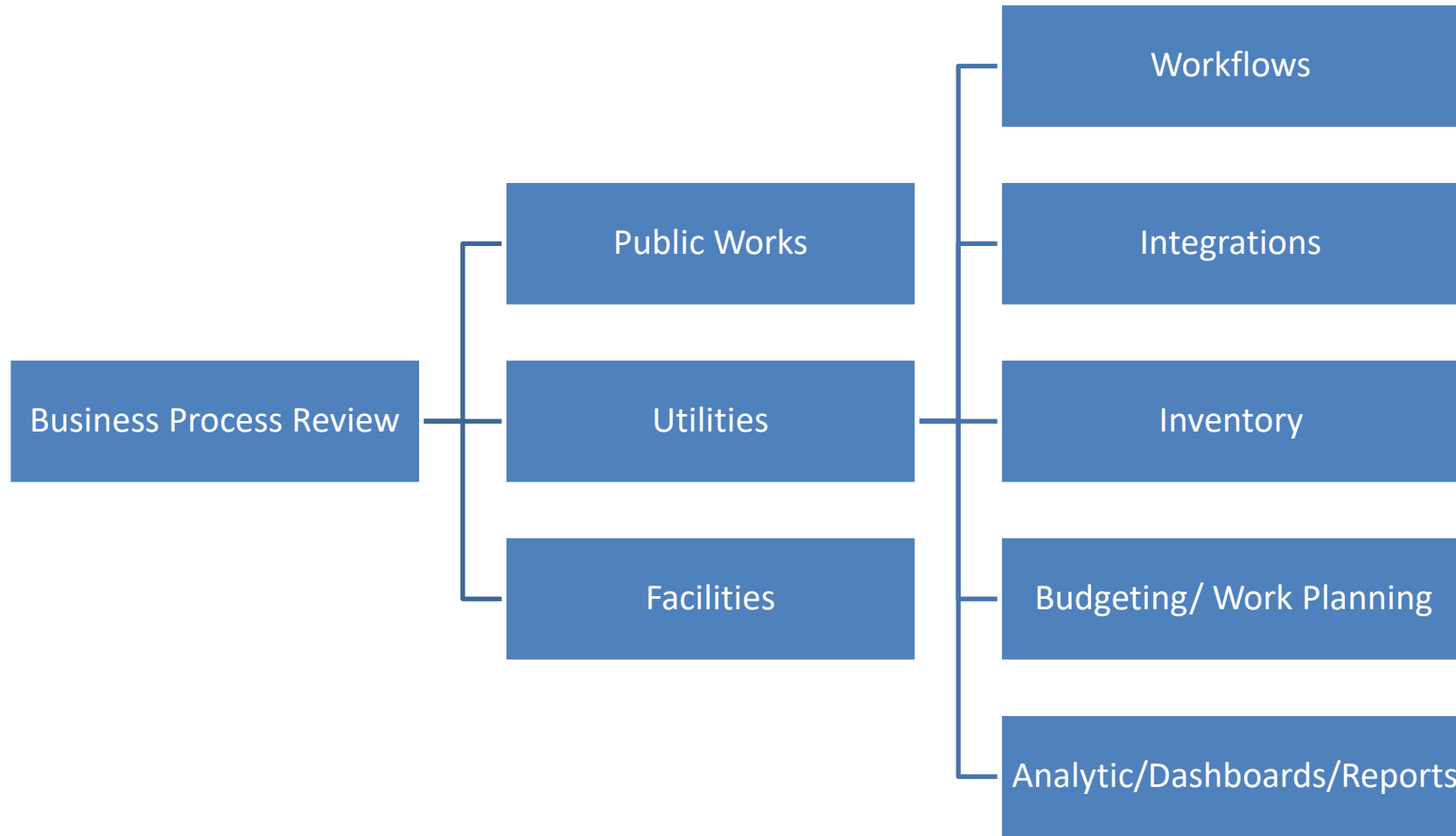
System Design Plan

- System Architecture and Implementation Plan



- Software Installation and Configuration

Workshops



Cityworks Configuration

- Public Works
- Utilities
- Facilities
- Storeroom
- Reporting
- Dashboards
- Performance
- Budgeting

The screenshot displays the Cityworks Configuration interface. The main window is titled 'Storeroom' and features a top navigation bar with icons for Issue, Receive, Transfer, Audit, Search, Requisition, and Build Assemblies. Below this, the 'Material' section lists various items with their quantities and units. A sidebar on the right contains navigation links for Issue, Receive, Transfer, Audit, Requisition, Build Assemblies, Search, Config, and User Menu. The bottom section of the interface shows a 'Work Order' form with fields for Account, Employee, Work Order Id, Task, and Comments, along with a 'Transaction Date' and 'Asset' dropdown. Below the form are several charts: a 'Maintenance Asset' bar chart, a 'Work Orders by Category' bar chart, a 'Priority' donut chart, and a 'Count of WORKORDER' bar chart.

Material	Quantity	Unit
WMH129008 ~ #48 MAIN VALVE RUBBER SEAL M&H 129 ~ ITEM # 48	106	EA
PUMPSUB1HP3/4SLD ~ 1 HP submersible pump ~ 43801	15	EA
Fire Hose 1.5" x 50' ~ 1.5" x 50' Yellow Rubber Covered Fire Hose ~ RC15151-1	15	EA
TS_POST_10 ~ 10 Ft Post ~	60	EA
W10IN DIP ~ 10 inch Ductile Iron Pipe ~	98	LF
WW10INPRESCLAMPS ~ 10 inch Pressure Clamps ~	15	EA

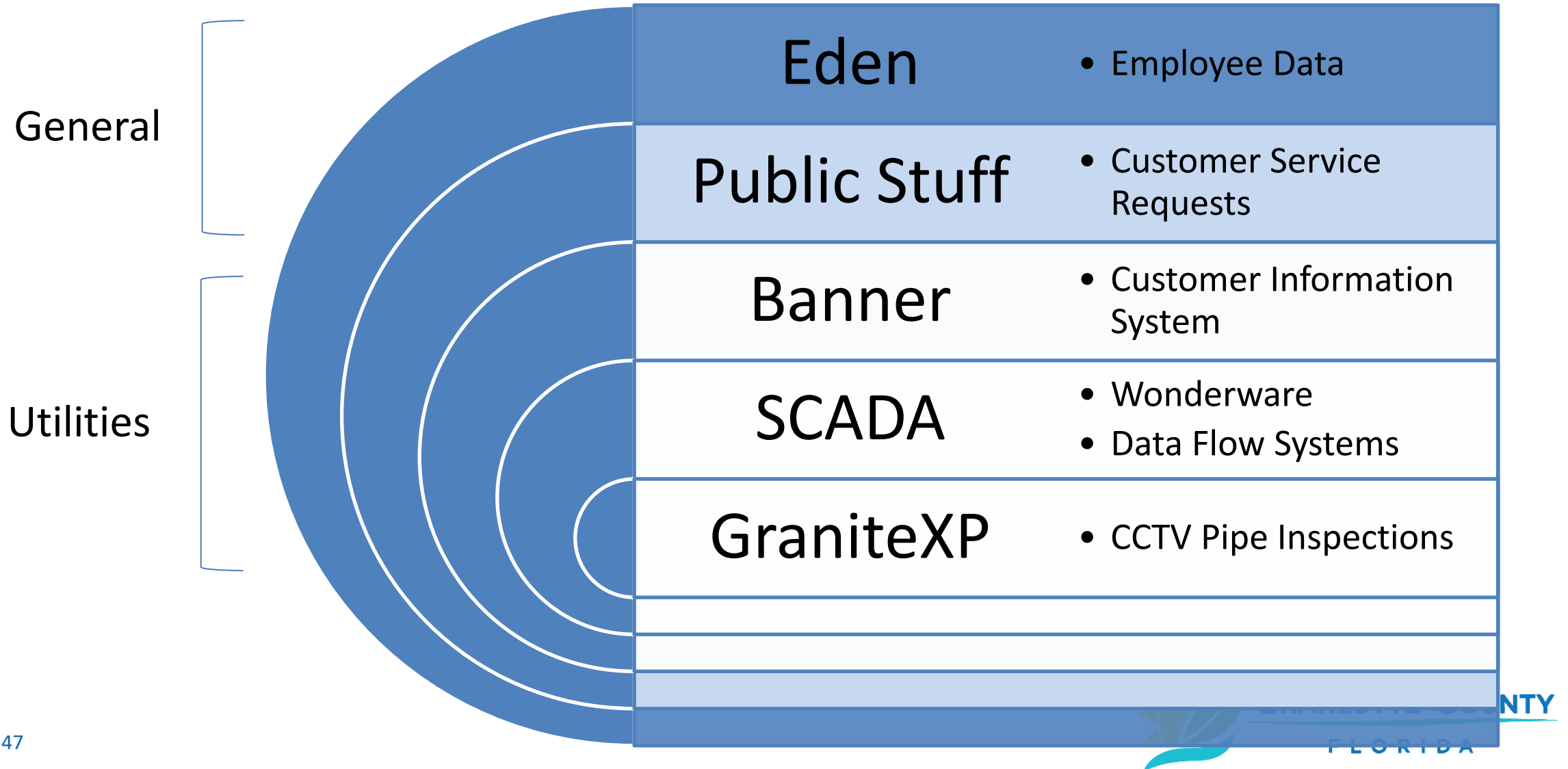
Work Order Form Fields:

- Account: [Dropdown]
- Employee: [Dropdown]
- Work Order Id: [Text]
- Task: [Dropdown]
- Comments: [Text Area]
- Transaction Date: [Calendar]
- Asset: [Dropdown]

Charts:

- Maintenance Asset:** Bar chart showing counts for various assets like CIP PROJECT, CONSTRUCTION, etc.
- Work Orders by Category:** Bar chart showing counts for categories like CAPITAL, CORRECTIVE, PREVENT, etc.
- Priority:** Donut chart showing the distribution of work orders by priority, with a total of 1,112.
- Count of WORKORDER:** Bar chart showing counts for different work order types.

Integrations

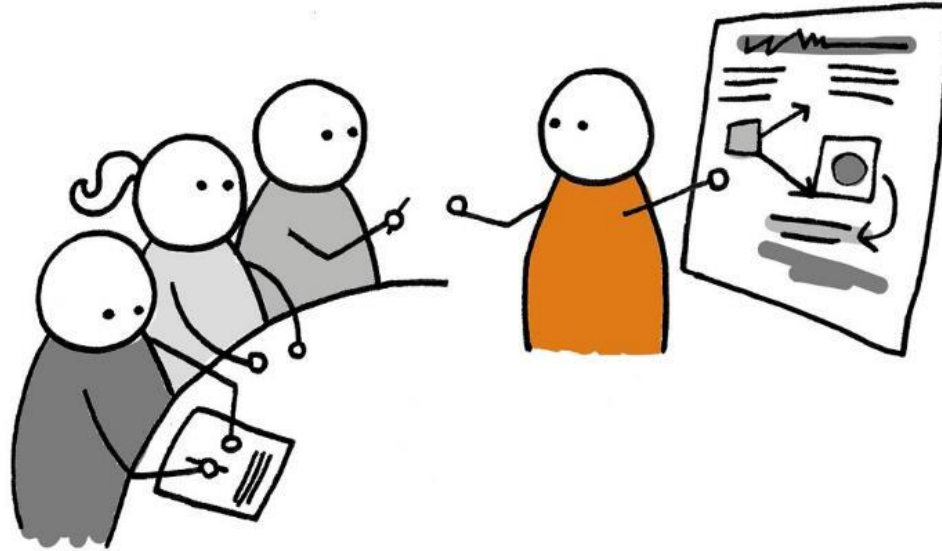


Testing and Training

End User
and
Designer

Testing

Go-Live

A screenshot of a web-based software interface for a Work Order system. The interface is divided into several sections. At the top, there's a navigation bar with tabs like 'Home', 'Calendar', 'Service Requests', 'Work Order', 'Inspection', 'GIS Search', 'Projects', 'Customer Accounts', 'Report Manager', and 'Designer'. Below this, the 'Work Order' section is active, showing details for a specific work order. It includes fields for 'Number' (1903), 'Entity Type' (MAINT), 'Category' (Line Repair - Mains), 'Status' (Closed), 'Priority' (Subcritical), 'Requested By' (Lee, Edward), 'Submitted To' (Snow, Erik), 'Project Start' (01/3/2019 3:57 PM), 'Project End' (01/3/2019 3:57 PM), 'Closed By' (Mashkova, Christine), 'Actual Start' (01/3/2019 2:05 PM), and 'Actual End' (01/3/2019 2:05 PM). There are also sections for 'Comments', 'Details', 'Attachments', and 'Map Layer Fields'. The 'Details' section shows a list of work order items with columns for 'Project', 'Contract', 'Contractor', 'Contractor Billable', 'Update Map', 'Cancel Work Order', 'Cancelled By', 'Cancel Reason', 'Units Accomplished', 'Labor Units Cost', 'Material Cost', 'Equipment Cost', and 'Total WOC'. The 'Attachments' section shows a list of attachments with columns for 'File Name', 'File Size', and 'File Type'. The 'Map Layer Fields' section shows a map of the work order location with various layers like 'Line Repair', 'Mains', 'Cables', 'Valves', 'Meters', 'Manholes', 'Pipes', 'Structures', 'Vegetation', 'Topography', 'Aerial', 'Satellite', 'Street View', and '3D Model'. The 'Work Cycle' section shows a table with columns for 'Repeat', 'Interval', 'From', 'To', 'Project Start Date', and 'Next Due Date'. The 'Service Requests' section shows a table with columns for 'Request ID', 'Request Description', 'Request Status', 'Request Date', and 'Request User'. The 'Inspections' section shows a table with columns for 'Inspection ID', 'Inspection Description', 'Inspection Status', 'Inspection Date', and 'Inspection User'. The 'Work Orders' section shows a table with columns for 'Work Order ID', 'Work Order Description', 'Work Order Status', 'Work Order Date', and 'Work Order User'. The 'Parents' section shows a table with columns for 'Parent ID', 'Parent Description', 'Parent Status', 'Parent Date', and 'Parent User'. The 'Attachments' section shows a table with columns for 'Attachment ID', 'Attachment Description', 'Attachment Status', 'Attachment Date', and 'Attachment User'. The interface is designed with a clean, modern look using a blue and white color scheme.

Schedule

- Testing and Training
 - Public Works February/March 2022
 - Utilities April 2022
 - Facilities May 2022
- Go Live
 - Public Works April 2022
 - Utilities TBD
 - Facilities TBD

Expected Benefits

- Full accountability of county assets
 - Public Works
 - Utilities
 - Facilities
- Evaluate levels of service
- Opportunity for additional department participation
 - Community Services
 - Fleet
 - Public Safety
 - Mosquito Control

Efficient & Effective Government

To manage fiscally sound county operations with a culture of transparency, accountability, citizen engagement and innovation.

Efficient & Effective Government

Revised Goals

- Ensure Culture as “Great Place to Work”
- Ensure Culture of continuous improvement
- Increase “Line of Sight”

Organizational Culture

Ensure Culture as “Great Place to Work.”

Mission, Vision & Values

Our MISSION
Delivering Exceptional Service

To preserve and enrich our community's quality of life for those who live, work and play in our paradise.

Our VISION

Our VALUES
Charlotte CARES
Committed
Accountable
Resourceful
Energetic
Supportive

 **CHARLOTTE COUNTY**
FLORIDA

MISSION
Delivering Exceptional Service

Mission
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VISION
To preserve and enrich our community's quality of life for those who live, work and play in our paradise.

Vision
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VALUES
Charlotte CARES: Committed, Accountable, Resourceful, Energetic, Supportive

Values
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Values
Charlotte CARES: Committed, Accountable, Resourceful, Energetic, Supportive



CHARLOTTE COUNTY
FLORIDA

Mission, Vision & Values

BCC approved MVV on Dec. 10, 2019

Rollout launched February 2020

- Meeting In A Box, facility signs, Hector's column
- Badge reels, lanyards, stickers, mouse pads, tent cards, etc.
- Meeting guides, Connect@Work digital toolbox
- Pandemic pause March 2020

Mission, Vision & Values

MVV re-launch May 2021

- Signage in highly visible locations
- Exceptional Service Award challenge coins
- Resume Meeting In A Box
- MVV Video production
- Increased messaging

Organizational Culture

Ensure Culture of continuous improvement.

A Continuous Improvement Organization

- Adapting to changing needs of our community
- Innovative use of software
- Multi-channel delivery of services
- Continuous adjustment of processes
- Accreditation in multiple department
- Use of best practices and standards
- Focus on standardization of processes across the organization

Accomplished Culture of Continuous Improvement

- Capital Project Delivery Program: Governance Framework and Operating Guidelines
 - Countywide manual
 - Defines roles and responsibilities
 - Standardized processes across departments
 - Provides tools for effective project management

Current Steps for Culture of Continuous Improvement

- Implemented Quarterly PM Training
 - Training is with all PM's or department specific
 - Provides a forum for PM's to discuss
 - Current projects
 - General contract provision
 - Governance framework
 - Opportunity for knowledge sharing
 - By reviewing lesson's learned, experienced PM's are able to share successes to provided additional tools to other PM's

Next Steps for Culture of Continuous Improvement

- Review project management systems
 - Goals of a project management system
 - Automate processes
 - Track schedules and budgets
 - Streamline design review process
 - Tracking and response for RFI's and submittals
 - Seamless input of new assets into Cityworks
 - A countywide project management system can:
 - Improve visibility and transparency of capital projects
 - Increase efficiencies
 - Provide less input and more output
 - Monitor and mitigate risk

Organizational Culture

Increase “Line of Sight” .

Increasing Line of Sight

- Ambassador Program
- Leadership Development Program
- Connect@Work Monthly Report email
- Strategic Plan placemats
- Meeting In A Box

Increasing Line of Sight

- Employee messaging through newsletter and weekly messages
- Employee training and teambuilding workshops
- Employee orientation
- Focus on internal communications